

**Proposal and Methodology to Assist  
the Jekyll Island Authority in  
Preparing an Analysis of the Visitor Experience on the Island**

**Synopsis**

Having secured a revitalization partner and with planned redevelopment projects in the pipeline, a key question for Jekyll Island now is: "What is a sustainable level of future development that both protects the island's environmental resources and delivers the type of visitor experience that is expected of "Georgia's Jewel"? The proposed analysis will produce three useful products that will help the JIA to objectively predict the effects of already planned redevelopment, while defining a range of appropriate long-range future growth scenarios that will not overburden the island's resources or be detrimental to the visitor experience.

- (1) The analysis will forecast how Jekyll is most likely to grow and develop in the future based on market forces, already planned projects, future growth potential in developable areas, likely rates of absorption, as controlled by existing development regulations and environmental policies (i.e., the 65% undeveloped 35% developed rule);
- (2) Based on historical trends and objective data, the analysis will provide a 20-year forecast of resulting visitor growth and the types of economic, transportation congestion and fiscal impacts that are likely to result from future growth scenarios; and
- (3) The evaluation will estimate how those future conditions/forecasts will compare to Jekyll Island today and in the past, as well as to other well known, comparable coastal resort communities in the southeast. Using this context, the JIA Board will be able to (1) envision where Jekyll's future could "fit" within the continuum of these comparables, and (2) set policies to insure that Jekyll revitalizes in a manner that accomplishes the long range preservation of the island, provides for adequate and modern infrastructure and emulates or exceeds the most desirable features of existing alternatives.

The evaluation will be led by Bleakly Advisory Group working closely with land planners/architects and infrastructure and transportation consultants who are familiar with the island. The proposed methodology contains six tasks, which are summarized below and explained in more detail in the proposed Scope of Services.

Deliverables will include a written report, summary presentation and forecasting model that can be used by the authority for future project evaluation, growth analysis and business planning. The evaluation process will include at least one progress meeting and a second work session with the JIA Board to discuss the implications of the findings. The research will begin upon authorization to proceed and will be completed ~~within approximately~~ 75 days.

**Detailed Scope of Work**

A portion of the debate surrounding the revitalization of Jekyll Island focuses on the need to understand and forecast the impacts of future development on visitation and the resulting impacts of increased visitation on the island's environmental resources and future affordability. Implicit in that debate is the view that Jekyll has a finite capacity to accommodate more development and visitors. As development, visitation and use of environmental resources increases, at some point the visitor experience is likely to change, costs will rise beyond the means of average Georgians and, ultimately, the island's environmental resources could degrade. As staff have noted, the appropriate question for Jekyll is not "how much development is too much" but rather, what is an appropriate or acceptable level of development for Jekyll that both protects the island's environmental resources and delivers the type of visitor experience that is expected of "Georgia's Jewel".

Analysis

This latter question is inherently subjective and there will always be a difference of public opinion concerning what constitutes an "acceptable or appropriate" level of future development on the island. It is unrealistic to expect that any study can identify and quantify a single "optimum" vision for Jekyll's future growth. However, it is possible to produce three useful products:

- (1) collect empirical, objective data to realistically forecast how Jekyll is most likely to grow and develop in the future based on market forces, planned projects, future development potential, existing development regulations and environmental policies;
- (2) quantify (within ranges) the types of resulting, economic, transportation and fiscal impacts that future development will generate; and
- (3) estimate how those future conditions and impact forecasts compare to Jekyll Island today and in the past, as well as to other comparable resort communities in the southeast.

If the range of realistic future development scenarios and impacts on Jekyll can be quantified and understood in the context of similar locations that are familiar to many Georgians, then it ~~should be possible~~ have an informed discussion concerning whether all or part of the most likely growth range for the island is appropriate or acceptable. If the consensus is that the forecasted build out is unacceptable, then the analysis should suggest alternative(s) that could be preferable. The goal of the analysis and resulting Board discussion should be to **define the types of policies, implementation measures and business planning principles that must be implemented by the JIA to produce a growth outcome (or range of outcomes) that is considered acceptable and desirable given the unique mission of Jekyll Island.**

The specific methodology to accomplish the evaluation objectives includes the following tasks:

1. Analyze/forecast the likely characteristics of Jekyll Island's future build out under existing policies and development controls. This analysis will consider (1) past rates of growth and decline, (2) the collective characteristics of planned projects already in the pipeline, (3) the physical characteristics and suitability of remaining potential development sites within the 35% of the island's developable land area, and (4) market forces impacting the nature and demand for future accommodations and second homes. Working closely on this task with Cooper Cary & Associates, who prepared the earlier design guidelines for the Island, Bleakly Advisory Group will examine the island's Comprehensive Plan and Conservation Plan. The firm will use that information to update and prepare conceptual estimates of future build-out distributed by general product types and locations. Bleakly Advisory Group (BAG) will use this information to prepare conceptual growth forecasts and will build a forecasting model that can be easily manipulated to consider different alternatives and the impacts of policy changes. The model will address overall growth rates of development over a 20 year forecast period and will be capable of making alternative distributions of transient accommodations, year round homes, seasonal residences and commercial development. As part of this effort, BAG will meet with Linger Longer and other developers, major island property/business owners to gain their insights and to make these forecasts as realistic as possible.
2. Using the growth projections prepared in Task 1, calculate the resulting impacts of growth on key capacity measurements of population change and visitation, traffic demand and levels of service, water and sewer service demands, beach usage and impacts on environmentally sensitive areas. The scope of the analysis will distinguish

impacts among permanent and seasonal residents, short-term overnight visitors and day trippers. A transportation and civil engineering firm will prepare projections that address average, peak seasonal and peak hour traffic volumes and level-of-service impacts on key intersections on the island. They will also examine current estimates of the capacity if the island's water, sewer and other utility systems to accommodate the projected future growth. The purpose of this effort will be to estimate levels of future development that may trigger the need for major traffic and other infrastructure investments. Visitation projections will also estimate future water consumption and wastewater treatment impacts, beach usage and visitor traffic on the island's important environmental resources. The impact measurements will establish a baseline correlation between past development trends and levels of island visitation. Those correlations, as well as inputs developed in Task 3, will be used to forecast the likely effects of future development on island tourism and traffic. The forecasting model will enable the consultant team to correlate visitation impacts to future development and to examine alternatives to mitigate undesirable impacts through varying land use allocations, growth rates and densities.

3. Establish a context for understanding the consequences of future growth on the visitor experience at Jekyll Island. Without context, it will be difficult for the JIA Board or the public to envision how the revitalization and future growth of Jekyll Island will positively or negatively influence environmental quality and the character of future visitor experiences. BAG will establish a context for evaluating growth impacts on Jekyll Island by examining the existing characteristics of a range of comparable destinations in the Southeastern U.S. With the input from the Authority, and Cooper Cary, BAG will first identify three to six representative locations that would serve as informative examples of what Jekyll could become in the future. These comparables may include locations that are perceived to be desirable or undesirable visions for the future, but all should be familiar and recognizable to most island constituents. Some potential comparable locations could include:

In Georgia:

- o Saint Simons
- o Tybee Island

In Other States:

- o Sanibel Island/Captiva FL
- o Big Pine Key, FL
- o Amelia/Fernandina Beach FL
- o Pensacola Beach (Also a land trust) FL
- o Singer Island/John D. MacArthur State Park, FL
- o The Florida Keys
- o Ocracoke Island or other Barrier Island NC

Once the comparable locations are identified by the JIA Board and Staff, the consultant team will collect existing available information to compare them across a range of quantifiable measures. These measures will include housing, hotel accommodations and commercial development levels, population densities, recent growth rates and annual visitation, presence of environmental resources/attractions, miles of public beach, traffic volumes and related growth indicators. To account for the varying size and accessibility of these comparables, BAG will "standardize" measures on a per-acre, per square mile or other meaningful basis. By calculating similar measures for Jekyll Island under Task 2, BAG will be able to compare existing and forecasted conditions for Jekyll Island against

current conditions in the comparable destinations. This comparison will provide objective measures to predict how future development density, visitation levels, traffic congestion and visitor experiences at Jekyll might compare to destinations with similar levels of economic activity today. The public's perception concerning the desirability of existing destinations, which are most comparable to what the island might become in the future, can be used to help define a realistic upper limit of development and density that is appropriate for Jekyll over the forecast period.

4. Measure the fiscal/cost implications of these projections on the JIA's operations. As part of Task 2, the analysis will produce a forecasting model that will identify certain benchmarks of growth and development that may trigger need for major public improvements on the island. The model will include a module that can be used to assist the Authority in predicting the timing and potential cost of these investments and, if necessary, model alternatives to delay/mitigate those costs. This information will be useful for future business planning and will assist the Authority in maintaining adequate revenue streams and negotiating future development agreements that are financially beneficial to the island. This model can also become an important tool to developing a more detailed business plan for financing future public improvements.
5. Hold a progress meeting and a work session(s) with the JIA Board and staff to discuss the analysis findings and build consensus toward defining "acceptable" levels of future impacts. As part of this effort, the consultant team will work with the JIA Board to communicate the evaluation findings and start informed discussions concerning what constitutes sustainable levels of future development impacts from the Board's perspective. The evaluation will not determine a single optimal forecast, but will inform the JIA about the range of realistic future growth scenarios and their resulting economic and environmental impacts. The consultant team will present this information in a manner that is understandable and objectively links the forecasts, using data and appropriate visuals, to existing conditions in other resort destinations. The team will also facilitate the meetings to solicit the Board's input and build consensus toward a range of preferable alternatives. At the conclusion of the evaluation and if desired by the JIA Board, the Evaluation Team could propose as a follow-on task, a public process of facilitated work sessions to gain additional insights from different island constituencies. One of these meetings might be designed specifically to involve the Legislative Oversight Committee and/or other groups interested in the island's future.
6. Synthesize findings and Board comments to define "preferable" growth/impact scenarios and recommend implementation measures to achieve desired outcomes. The conclusion of the analysis and Board input should result in the beginnings of a consensus concerning what levels of future growth are within the island's capacity to accommodate, and would be considered acceptable and appropriate by most island constituencies. Once this preferred "vision" is defined, it may or may not be necessary for the JIA to take specific actions to insure that these desired outcomes are achieved and that unacceptable outcomes are avoided. The consultant team will offer a series of recommendations to assist the JIA to achieve the preferred vision.

### **Project Schedule and Budget**

The Authority will retain, under separate contract, qualified planning, engineering and transportation professionals who will be able to assess the impacts of growth projections on the island and its infrastructure systems. BAG will take lead responsibility for preparing the growth

forecasts, the analysis of visitor experience and preparing a report and summary presentation that summarizes the results of the analysis process. The budget for BAG's services under the change order is provided below:

Task Description		Fee Estimate
1	Prepare a build-out analysis and growth forecasts	\$10,000
2	Calculate the resulting impacts of growth on key capacity measurements of population change, visitation, traffic demand and levels of service, water and sewer service demands, beach usage and impacts on environmentally sensitive areas.	\$2,500
3	Analyze existing development densities and impacts on comparable destinations to establish a context for understanding the consequences of future growth on the visitor experience at Jekyll Island.	\$12,500
4	Forecast the fiscal/cost implications of these projections on the JIA's operations	\$3,500
5	Hold a progress meeting and work session with the JIA Board to discuss the analysis findings and build consensus toward defining "appropriate and acceptable" levels of future impact.	\$2,000
6	Synthesize Board input and recommend "preferable" growth/impact scenarios and implementation measures to achieve desired outcomes.	\$3,500
Direct Expenses: Travel, Data Collection, Deliverables		\$2,000
<b>TOTAL COST:</b>		<b>\$36,000</b>

Upon receiving authorization to proceed, BAG will be prepared to begin work. We will coordinate our schedule with Cooper Cary & Associates and Thomas & Hutton for the timing of their work tasks. The team will be prepared to report preliminary findings of Tasks 1 and 2 by the end of January. We will complete the comparables analysis in February and be prepared to hold work sessions with the JIA in late February/early March, with the final report and implementation recommendations delivered by March 15, 2008. Deliverables to JIA will include the forecast model(s), an electronic version of the full written report and executive summary, plus a PowerPoint presentation of the evaluation findings.

# Jekyll Island Visitor Impact Forecasting Model

